

Product & strategy brief

The honest, effortless way to run construction projects — live budget, change orders, and schedule, with a client portal people actually love.

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SECTION 01

The opportunity

Why a disciplined, beautiful, focused tool can win a crowded market.

The residential construction software market is crowded, but it is crowded at the extremes. At one end sit powerful all-in-one suites — JobTread, Buildertrend, Procore — that answer "how do I run my projects?" by handing the builder eighty features and a multi-week onboarding. At the other end sit horizontal tools like Monday.com, blank canvases that require the builder to invent construction logic themselves. Pettus Builders has tried both ends and rejected both, for the same underlying reason: neither removes mental load. The honest current state of each project still lives in spreadsheets, group texts, and people's heads.

The opportunity is not to build a better suite. It is to build the **deliberately minimal** tool that the market keeps asking for and no one has had the discipline to ship: three things done exceptionally — a live budget, change orders, and a schedule — wrapped in a client experience that is genuinely a pleasure to use. The bet is that in a market of feature maximalists, restraint is the differentiator.

THE WINDOW IS OPEN RIGHT NOW

CoConstruct — historically the one tool custom builders loved for its simplicity — has been absorbed into Buildertrend and is being shut down, with new projects cut off **March 31, 2027**. Meanwhile Buildertrend has moved to opaque, revenue-scaled pricing (renewal increases of 50–65% are widely reported) and is chasing larger production builders. A cohort of exactly-our-target builder is actively re-shopping — and the segment leader is walking away from them.

Who we're building for

The primary customer is the small-to-midsize custom home builder and high-end remodeler — a firm like Pettus Builders running a handful to a few dozen concurrent projects worth hundreds of thousands to several million dollars each. These firms have a business owner who needs a portfolio view, project managers who each run several jobs, and discerning homeowner clients who expect transparency on a project that may be the largest purchase of their lives. They are too sophisticated for service-dispatch tools like Jobber and too lean for enterprise platforms like Procore.

SECTION 02

Competitive landscape

Every credible competitor over-serves or mis-serves the focused custom builder.

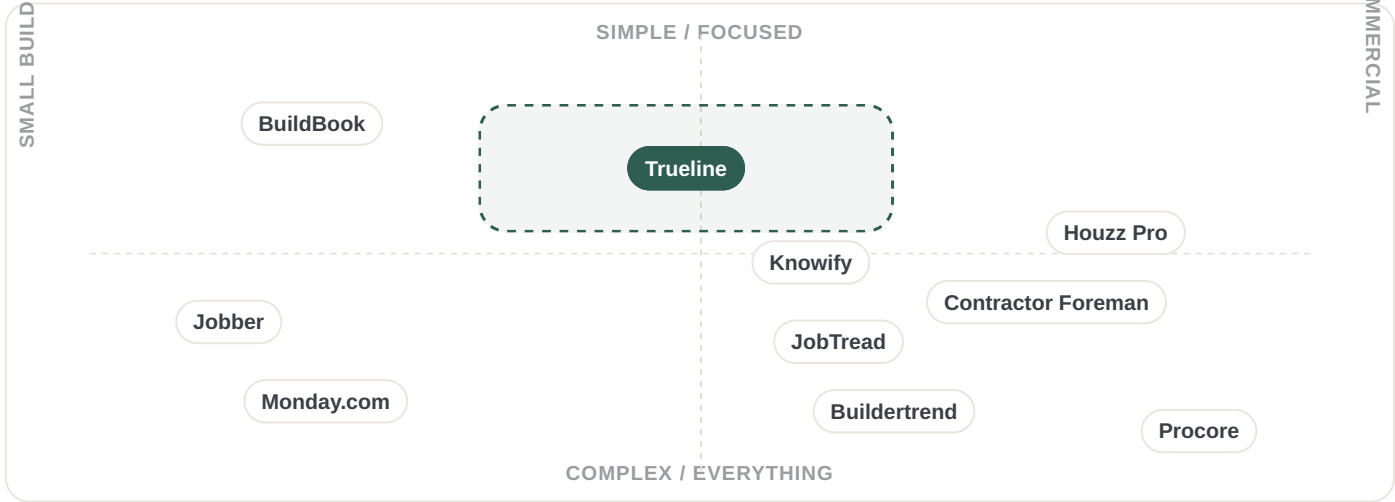
The table below maps the field on the dimensions that matter for our three pillars. The recurring pattern is unmistakable: purpose-built tools are capable but heavy, and the few simple tools are either the wrong shape for construction or still bundle a full CRM and sales suite.

TOOL	REAL COST*	BUILT FOR	WHY IT'S NOT THE ANSWER
JobTread	~\$239/mo	Small–mid residential, all-in-one	Powerful and budget-centric, but "all-encompassing" — cost-type, margin and selection logic drive a real learning curve. The tool you already rejected.
Buildertrend	\$349–599/ mo or quote	Larger / production builders	"A mile wide and an inch deep... not designed for the custom home builder." Change orders + budget gated to the Pro tier; renewal price hikes; no bulk export.
CoConstruct	—	Custom builders (retiring)	The closest cultural fit — being force-migrated into Buildertrend; new projects end Mar 31, 2027.
Houzz Pro	\$249/mo → quote	Design-build, remodelers	Budget, change orders and schedule live in a quote-only "Custom" tier; reviewers call those exact financial modules "clunky." QBO one-way only.
Procore	~\$10–30K/yr	Enterprise commercial GCs	Textbook overkill: "half the features collect dust," 3–6 month learning curve, homeowner-grade portal absent.
Knowify	\$99 → \$329/ mo	Job-costing operations platform	Deepest QuickBooks sync in the category, but job costing sits at the \$329 tier and it's an operations platform, not ultra-simple.
Contractor Foreman	\$49–332/mo	Budget-conscious small contractors	Cheapest all-in-one — and its top complaint is literally "almost too many features... overwhelming." Same trap, lower price.
Jobber	\$29–699/mo	Home-service trades	Wrong shape: a "job" is a visit. No true construction change orders, no multi-month build schedule, no whole-job budget.
Monday.com	\$9–19/seat	Any team (horizontal)	No job costing, change orders, or cost codes. The other tool you rejected — an empty canvas you'd have to build into construction software.
BuildBook	\$79–149/mo	Simple residential PM	The closest existing product — but still ships a full CRM/sales suite on

TOOL	REAL COST*	BUILT FOR	WHY IT'S NOT THE ANSWER
			top of the core, so it isn't truly minimal.

*Realistic monthly cost for a small builder to actually get the three core capabilities. Figures from July 2026 research; Buildertrend and Procore now price largely by quote/revenue. Clearstory (commercial change-order specialist) and Beam (CompanyCam-acquired, finance-led) are adjacent benchmarks, not direct competitors.

The market, mapped



The dashed zone — simple and construction-native and focused on the core three — is effectively unoccupied. BuildBook edges toward it but carries a full sales suite. This is where Trueline lives.

SECTION 03

Positioning & the wedge

We win by discipline — and by refusing the features that create the bloat.

Trueline's positioning is a single sentence: **the honest, effortless way to run construction projects**. Every design decision serves two promises — remove mental load, and keep everyone (team and client) looking at the same honest current state. The strategy is subtractive. The hard part is not adding capability; it is having the discipline to leave things out, because every incumbent that set out to be simple eventually caved to feature parity.

<p>Remove mental load</p> <p>The current state of budget, changes, and schedule is always current and always in one place — no reconciling spreadsheets, texts, and memory.</p>	<p>One honest reality</p> <p>The team and the client look at the same numbers and the same timeline. Transparency isn't a report you generate; it's the default state.</p>	<p>Effortless by design</p> <p>Learnable in an afternoon, beautiful enough that people want to open it, priced so simply there's nothing to negotiate.</p>
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The discipline — what we deliberately won't build

Holding the line here is the product. We will not bundle a CRM, lead pipeline, or marketing suite — nobody buys these tools for that, and it's the number-one under-used module across the category. We will not add takeoff, timeclocks and GPS, RFIs and submittals, warranty tracking, or a complex selections-and-allowances engine — these are precisely

the modules reviewers cite as the hardest to learn and the source of the "mile wide, inch deep" feeling. We will not create multiple overlapping ways to do the same thing, gate the core three behind a higher tier, scale price to the customer's revenue, lock data in, or expose raw cost ledgers to homeowners. Each "no" is a feature.

SECTION 04

Users, roles & permissions

Three roles, per-project access, and one rule that never bends: clients never see margin.

Trueline serves three roles from one system, with access granted **per project** rather than globally. The business owner sees everything and an analytics layer no one else does. Project managers see only the jobs assigned to them. Clients see their single project through a curated, reassurance-first lens. The single most sensitive control in the product is visibility of cost and margin — clients never have it, and it can optionally be hidden from PMs as well.

CAPABILITY	OWNER (GARY)	PROJECT MANAGER	CLIENT
Portfolio across all projects	Full	Assigned only	—
Live budget — cost & committed detail	✓	✓ (margin optional)	—
Company margin & profit	✓	Toggle	Never
Create & price change orders	✓	✓	—
Approve / decline change orders	✓	Send only	Own COs
Schedule — edit phases	✓	✓	View
Client-safe budget & timeline	✓	✓	✓
Portfolio analytics & cash	✓	—	—
Integrations & team setup	✓	—	—

SECTION 05 · PILLAR 1

Live budget

The difference between a spreadsheet and real job costing is one column: committed.

The live budget is the heart of the product. Each project's budget is a grid of **cost codes** (a simplified residential list like Foundation, Framing, Plumbing, Cabinetry — not the fifty-division commercial CSI standard, which is overkill here) crossed with **cost types** (labor, material, subcontractor, other). Every line carries four numbers that tell the whole story at a glance.

COLUMN	WHAT IT MEANS	WHERE IT COMES FROM
Original	The budgeted amount from the estimate/contract.	Set at project start; adjusted only by approved change orders.
Committed	Money you've promised — signed subcontracts and issued POs — but not yet paid.	Entered when you commit; the moment it lands it reduces available budget.
Actual	Money actually spent to date.	Flows in automatically from QuickBooks Online and card/bank feeds.
Projected	Estimate-at-completion — actuals plus estimate-to-complete.	Defaults intelligently; a PM can override any line.

THE COMMITTED-COST INSIGHT

Cheap tools and spreadsheets only track what's been **spent**, so a project looks healthy right up until the bills arrive. Trueline's committed column draws down available budget the instant you sign a sub or cut a PO — so the projected-profit number at the top is honest weeks earlier. That single number, trustworthy and always current, is what an owner actually wants.

Above the line items sit a stacked bar (actual / committed / uncommitted against budget), a projected-profit figure with a target, and a contingency line treated as a first-class item so its drawdown is explicit — residential contingency typically compresses from 15–20% early to 3–5% during active construction, and seeing that burn down prevents nasty surprises. Lines trending over budget are flagged in plain color; nothing requires a report to be run.

SECTION 06 · PILLAR 2

Change orders

The messy, margin-leaking part of every project — made a clean, one-step loop.

Change orders are where custom projects make or lose their margin, and where trust with clients is won or lost. Today the loop is slow and leaky: price it somewhere, email a PDF, chase a signature, remember to update the budget, remember to re-invoice. Trueline makes it a single flow.

The lifecycle

1. **Draft** — capture the change and its scope.

2. **Priced** — add cost lines (tied to cost codes) and the client price; margin is computed.
3. **Sent** — the client sees a clean summary in the portal and signs with built-in e-signature.
4. **Approved / declined** — on approval, everything reconciles at once.

ONE APPROVAL, THREE UPDATES

Approving a change order simultaneously (1) adjusts the **contract sum** — the client's revised total, (2) writes new lines into the **live budget** and updates committed/projected, and (3) pushes the revised invoice to **QuickBooks**. No double entry, no forgotten re-bill, no leakage.

Trueline distinguishes **external** change orders (client-requested — they change the contract sum and revenue) from **internal** ones (a missed budget line, a site condition, an estimating correction — these move the budget but not the client's price). Both reconcile into the live budget; only external ones surface to the client. A running change-order log shows every order — approved, pending, declined — with its dollar impact and a clear "revised contract sum" at the top. Digitizing this loop is not cosmetic: paper change-order cycles average weeks; a clean digital loop cuts that to days, which means faster cash and less scope creep absorbed as goodwill.

Schedule

A timeline builders will actually maintain — and clients can actually read.

Full critical-path Gantt tools (Microsoft Project, Primavera, and the heavier construction suites) are overkill for custom residential work; they are so granular that no one keeps them current, so they lie. Trueline ships the right altitude: a **phase-and-milestone timeline** — major phases (demo, foundation, framing, rough-ins, drywall, finishes, landscape) and the milestones that matter (permits, inspections, material deliveries, substantial completion).

Each phase shows a **baseline** bar and an **actual** bar, with a "today" line, so slippage is visible instantly without dependency math. When a phase slips, the impact on the completion date recalculates — and, crucially, it's translated into plain language for the client rather than exposed as raw variance. "Rough-ins are running about a week behind due to the wine-cellar change; revised substantial completion is October 9 (was September 25)" is worth more than any Gantt chart. The schedule stays light on purpose: if maintaining it costs more than five minutes, it won't get maintained, and an out-of-date schedule is worse than none.

SECTION 08

The client portal

The feature that wins high-end jobs — and kills the "where are we?" phone call.

For a homeowner spending one to several million dollars, anxiety is the default emotion, and every unanswered question becomes a phone call to the builder. The portal's job is to convert that anxiety into calm confidence. It is deliberately **read-mostly and reassurance-first**: a beautiful, plain-language window that shows exactly what the team sees on budget and schedule — minus internal costs and margin.

Budget status

Original contract, approved changes, and "your contract today" — with a clear on-budget signal. No cost codes, no margin, no anxiety.

Change orders

Every change with its price, past and pending — plus one-tap approve/decline on anything awaiting them. Nothing hidden.

Timeline & photos

A simple phase tracker with a plain-language status and revised dates, and a weekly progress-photo feed — the emotional hook that makes clients feel part of the build.

A HYPOTHESIS TO VALIDATE

Builders clearly **value** a polished client experience as a way to win and retain work. Independent evidence that homeowners actively **use** existing portals is thinner. We should treat portal engagement as a hypothesis to test early with Pettus clients (starting with the Powers Residence), and let real usage — not assumptions — drive how much we invest here.

SECTION 09

Owner analytics

A one-screen portfolio health check — the view only the owner sees.

Because every project already produces the same clean data, the owner gets a portfolio rollup for free — no report-building, no spreadsheets. The default screen is a sortable list of all active jobs with the numbers that predict trouble, plus a few hero tiles and a short "what needs your attention" list generated from the data.

- **Margin health / fade** — forecasted vs. target margin per job, with the jobs whose margin is eroding surfaced to the top. This is the owner's number-one metric.
- **Budget variance** — projected-over/under by job, flagged early.
- **Change-order volume & value** — a revenue-recovery signal and a scope-creep signal at once.
- **Schedule slippage** — which jobs are behind, by how much, and whether the client has been told.
- **Cash & AR** — outstanding invoices and change orders, and where cash is tied up.

The design rule is glanceability: a small builder will never build Power BI dashboards, so the value is a zero-configuration rollup of data they're already entering, answering "which of my jobs needs me this week?" in five seconds.

SECTION 10

Integrations & architecture

QuickBooks first. Trueline owns the budget; QuickBooks stays the ledger.

The guiding principle is a clean division of labor: **Trueline owns the budget, cost codes, change orders, and schedule; QuickBooks Online stays the financial ledger.** We build QBO-first — QuickBooks Desktop is a declining, harder-to-integrate install base being sunset, worth supporting only if real demand appears. Estimates and budgets live in Trueline; we push bills, POs, and invoices out, and pull actual costs by job back in.

A REAL ARCHITECTURAL CONSTRAINT

In 2025 Intuit began **metering read access** to the QuickBooks API (its App Partner Program splits free "data-in" writes from paid "data-out" reads). That shapes our design: push data in freely, and pull actuals sparingly via webhooks and change-data-capture rather than constantly re-reading the ledger. A naïve "refresh every job every few minutes" design would be needlessly expensive. This is a solvable engineering choice, but it must be designed in from day one.

Integration priority

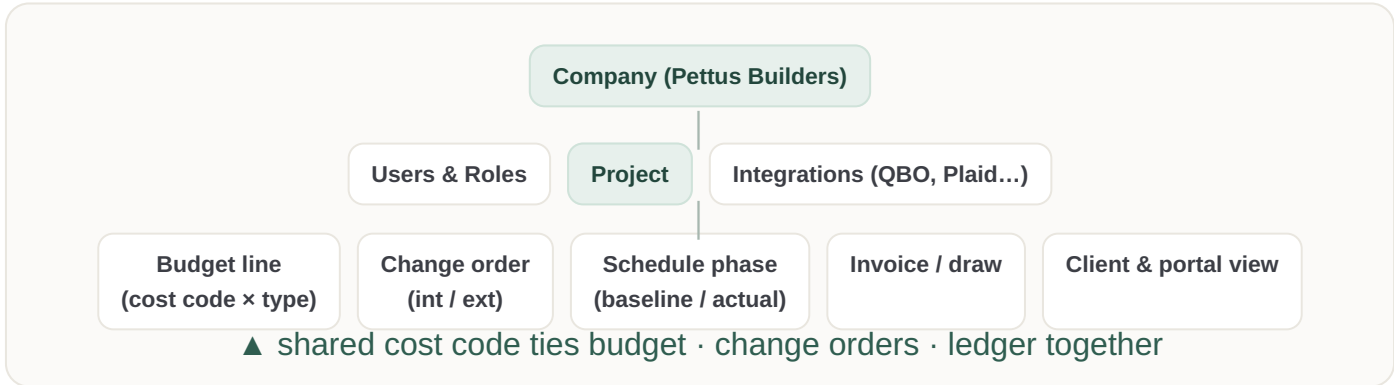
INTEGRATION	PURPOSE	PRIORITY
QuickBooks Online	Accounting ledger — actual costs in, bills & invoices out.	P0 · must-have
Bank / card feeds (Plaid)	Fastest path to real-time actuals and receipt capture.	P1
Gusto (payroll)	Labor cost by job — often the biggest line, weakly handled by QBO.	P1
CompanyCam	Field photos feeding the client portal's progress feed.	P1
E-signature	Change-order sign-off — built natively, not via a third-party dependency.	Native
Calendar / storage	Push milestones to Google/Outlook; attach plans and contracts.	P2

SECTION 11

Data model

Simple, but structured so budget, changes, and schedule stay in sync.

The schema is intentionally small. A **Company** has **Users** (with roles) and **Projects**. Each project owns its budget lines, change orders, schedule phases, and invoices — and every financial record hangs off a shared **cost code**, which is what lets an approved change order flow cleanly into both the budget and the ledger.



Two design choices do most of the work. First, the shared cost code across budget lines, change orders, and QuickBooks items is the join that keeps everything reconciled automatically. Second, change orders are first-class records (not just edits to the budget), so there is always a complete, auditable history of how the contract sum and budget got to today's number — which is exactly what both the owner and the client want to trust.

SECTION 12

How we'd build it

Prove the core loop on real Pettus jobs before building outward.

The build sequence mirrors the strategy: earn the right to add scope by nailing the core loop first, on live projects, with real money and real clients. Trueline is a responsive web application (equally usable on a laptop in the office and a phone in the field), with a clean design system and the QuickBooks-first sync at its core.

Phase 0 · Pilot	Phase 1 · MVP	Phase 2 · Polish	Phase 3 · Beyond
<p>~6–8 WEEKS</p> <p>Live budget + change-order reconciliation + QuickBooks sync on Powers Residence and one more job. Prove it removes load for PMs.</p>	<p>NEXT ~8–10 WEEKS</p> <p>Add the schedule, the client portal, roles & permissions, and CompanyCam photos. Roll to all Pettus projects.</p>	<p>FOLLOWING ~8 WEEKS</p> <p>Owner analytics, Plaid + Gusto for real-time actuals, e-signature, and the design refinement that makes it a pleasure.</p>	<p>LATER</p> <p>Second and third design-partner builders; decide whether Trueline becomes a product business.</p>

Two build models are worth weighing. A **lean custom build** gives full control over the exact minimal experience and the QuickBooks sync, and keeps the product truly ours. Alternatively, an early internal version could be assembled faster on modern app-building tools to validate the workflow before committing to a from-scratch build. Either way, the pilot's job is the same: prove the core loop is genuinely better before spending on breadth.

SECTION 13

Pricing & business model

Flat, published, all-in — the opposite of the category's drift toward opaque, revenue-scaled pricing.

Research puts the credible transparent band for a focused residential tool at roughly \$79–\$329/mo. BuildBook anchors the simple low end (\$79–149); JobTread (~\$239) and Knowify (\$329) anchor the capable-but-complex middle; Buildertrend (\$599+ or quote) and Procore (\$10–30K/yr) sit above. Trueline should price flat and all-inclusive in the **\$149–\$249/mo** range, with unlimited client and subcontractor portal users, a free trial, and one-click data export.

PLAN	PRICE	FOR	INCLUDES
Studio	\$149/mo	1–5 active projects	All three pillars, client portal, QuickBooks, 3 team seats.
Builder	\$199/mo	Growing custom builders	Unlimited projects, 8 seats, analytics, Plaid + Gusto.
Studio+	\$249/mo	Multi-PM firms	Everything, unlimited seats, priority onboarding.

Every tier includes the core three and the portal — we never gate the essentials or scale price to the customer's revenue. Both are explicit, repeated grievances with the incumbents, and refusing them is part of the brand.

SECTION 14

Naming options

Names that carry the promise — honesty, structure, calm. Domain status checked July 2026.

The best names here do double duty: a craft term that a builder respects, plus a second meaning that signals honesty or clarity. "Trueline" is the working recommendation — **true** (the honest current state; "running true," "true to plumb") and **line** (the budget line, the timeline) — and, usefully, its domain is actually available.

NAME	WHY IT WORKS	DOMAIN (CHECKED JUL 2026)
Trueline recommend	"True" = honest current state; "line" = budget line + timeline. Clean, premium, unambiguous.	trueline.build available (~\$30/yr)
Plumb	A plumb line shows what's truly vertical — the perfect metaphor for honesty. Strongest concept.	All obvious domains taken; would need a coined variant.
Truss	"Truss" (the structure that holds the roof) reads as trust . Short and memorable.	truss.build available (premium ~\$3,750); note "Truss Payments" exists.
Keystone	The stone that locks the arch — the single source that holds the project together.	Common brand name; obvious domains taken.
Baseline	Budget and schedule both have a baseline; change orders are deviations from it.	Obvious domains taken.
Cadence	The steady weekly rhythm of a well-run build.	Obvious domains taken; used elsewhere in tech.

Reality check from the domain search: nearly every short dictionary-word domain is gone, so the practical path is a coined or compound name (like Trueline) with a clean .build or a "get/use" variant. Worth a trademark and social-handle check before committing.

SECTION 15

Risks & open questions

The honest version — what could make this hard, and what to test first.

RISK / QUESTION	WHY IT MATTERS	HOW WE DE-RISK IT
Discipline drift	Every "simple" competitor eventually bloated. The pressure to add features will be constant.	Make the roadmap subtractive by default; treat each "no" as a feature; let real pilot usage justify any addition.
Portal usage unproven	Builders value the portal; homeowners' actual engagement is less certain.	Test with real Pettus clients early; invest to match observed usage, not assumptions.
QuickBooks API cost & fragility	Metered reads and OAuth fragility can raise cost and cause sync outages.	Design for data-in + webhooks/CDC from day one; build robust token-refresh and reconciliation.
Incumbent response	JobTread/BuildBook could add a "simple mode."	Compete on design and focus — hard for a feature-maximalist to copy without alienating its base.
Product vs. internal tool	Is this a business, or a great tool for Pettus? The answer changes the investment.	Use the pilot to learn; a tool that delights one builder is the strongest possible proof for many.
Who builds & maintains it	A polished product needs ongoing engineering and design.	Scope the pilot small; decide on build model (custom vs. assembled) after it proves value.

SECTION 16

Recommended next steps

Small, concrete, and aimed at proof.

1. **Walk the prototype with Gary and a PM.** Use the clickable concept to pressure-test the three pillars, the permission model, and the portal against how Pettus actually runs jobs.
2. **Pick two pilot projects.** Powers Residence plus one more — ideally one healthy and one with active change-order activity.
3. **Map one real budget and one real change order** end to end, including the QuickBooks touchpoints, to confirm the model fits reality.
4. **Decide the build model** (lean custom vs. assembled internal v1) and lock the Phase 0 scope.
5. **Settle the name** and secure the domain, handles, and a trademark check.

THE BOTTOM LINE

The gap is real, the timing is unusually good, and Pettus Builders is the ideal first customer and design partner. The winning move is discipline: do three things beautifully, put a genuinely lovely client experience on top, price it honestly, and refuse the bloat that every incumbent caved to. Start by proving the core loop on real jobs — then decide how far to take it.